USER MANUAL:

Onsight Account Manager
Version 6.1

Librestream Onsight Account Manager
Doc #: 400199-01
September 2012

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1 Onsight Account Manager Overview

Onsight Account Manager (OAM) is a secure online tool for system administrators to centrally manage their Onsight user licenses, manage corporate contacts lists and groups, and configure user license policies and settings. Using OAM, administrators can efficiently manage and maintain groups of Onsight users.

OAM provides tools for three main tasks:

- **Create and Manage User Accounts** – Onsight Administrators can view and manage the status of their Onsight Connect user license pool such as adding new Onsight Connect users.
- **Create and Manage Global Contacts List** – The Onsight Global Contact List is a centrally managed contact list that all Onsight users can access.
- **Configure Client Policies and Settings** – The Onsight Client Policies and Settings are applied to an Onsight endpoint when the user logs in.

1.1 Onsight Connect Service

The Onsight Connect Service is a centrally managed subscription based cloud collaboration service. An authorized user can log in to Onsight Connect on a Windows PC, iPhone, iPad and Librestream Onsight Device to begin collaborating.

Once logged in, an Onsight Connect user can securely view and share video, images, audio and telestration with another Onsight user. They can also share audio and video with a 3rd party video endpoint that supports Session Initiation Protocol (SIP). For more information on the full Onsight Connect capabilities, review the online documentation at http://www.librestream.com/support/knowbase.html.

2 Network Requirements

Onsight software requires HTTPS network protocol to communicate with the Onsight Account Manager.

HTTPS	443
Web Proxy	As set by your Enterprise's security policy
Wireless Network	802.11 a/b/g/n
Wired Network	A wired 10/100 Ethernet port is recommended.

2.1 Firewall Configuration

If Windows Firewall or other third party firewall software is running on the network where you are attempting to access Onsight Account Manager, you may need to add firewall exceptions for the ports listed in Table 1.

Table 1 – Windows Firewall Exceptions

Name	Protocol	Port	Description
HTTPS	TCP	443	Required if remote endpoints will access the package server or Web Service interface over HTTPS. If your IIS configuration uses a port other than 443, ensure that you have allowed that port instead.

3 Logging into OAM for the First Time

3.1 Logging In

You will receive your OAM Administration login information from Librestream via an email.

To login to OAM, open a browser and navigate to **https://onsight.librestream.com**. You will be presented with the login screen shown in Figure 1.

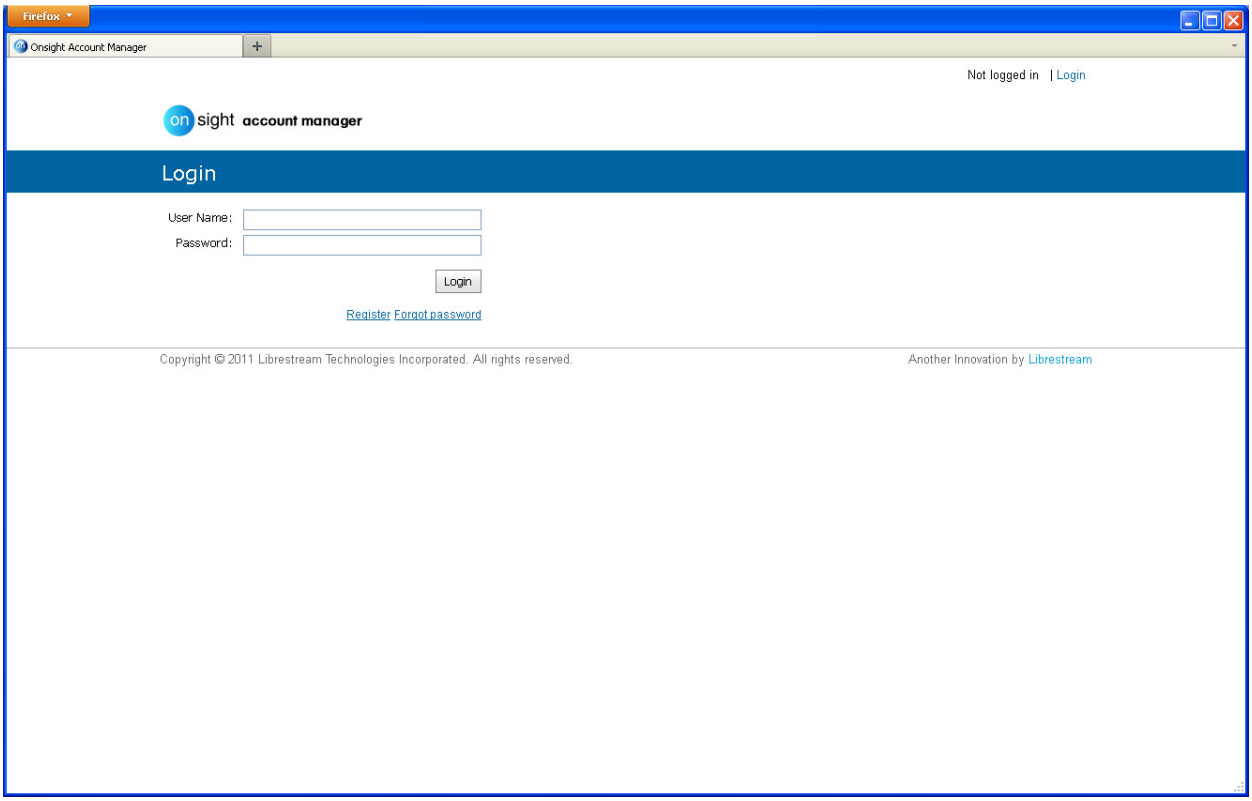

Figure 1 – Logging In to Onsight Account Manager

To get started with OAM, log in with the user name and password that Librestream provided to you via email in the following format:

User Name: user@domain.com

Password: Password

To avoid unauthorized access to the software, you should change this password immediately after logging in for the first time, as described in Changing the Administrator's Password in paragraph 4.1.2, on page 6.

After successfully logging in you will be taken to the Home page.

3.2 Home

The OAM Home page provides a **Summary** of the Users, Licenses and Sessions currently assigned and active on the OAM Server as shown in Figure 2. There are direct links to the configuration and status pages for each item in the Summary list as well as access to the pages through the tabs at the top of the page.

Also on the Home page is a list of current **Notifications** for the Administrator. Notifications appear when a User has registered for an Account and it requires Administrator approval before use can begin.

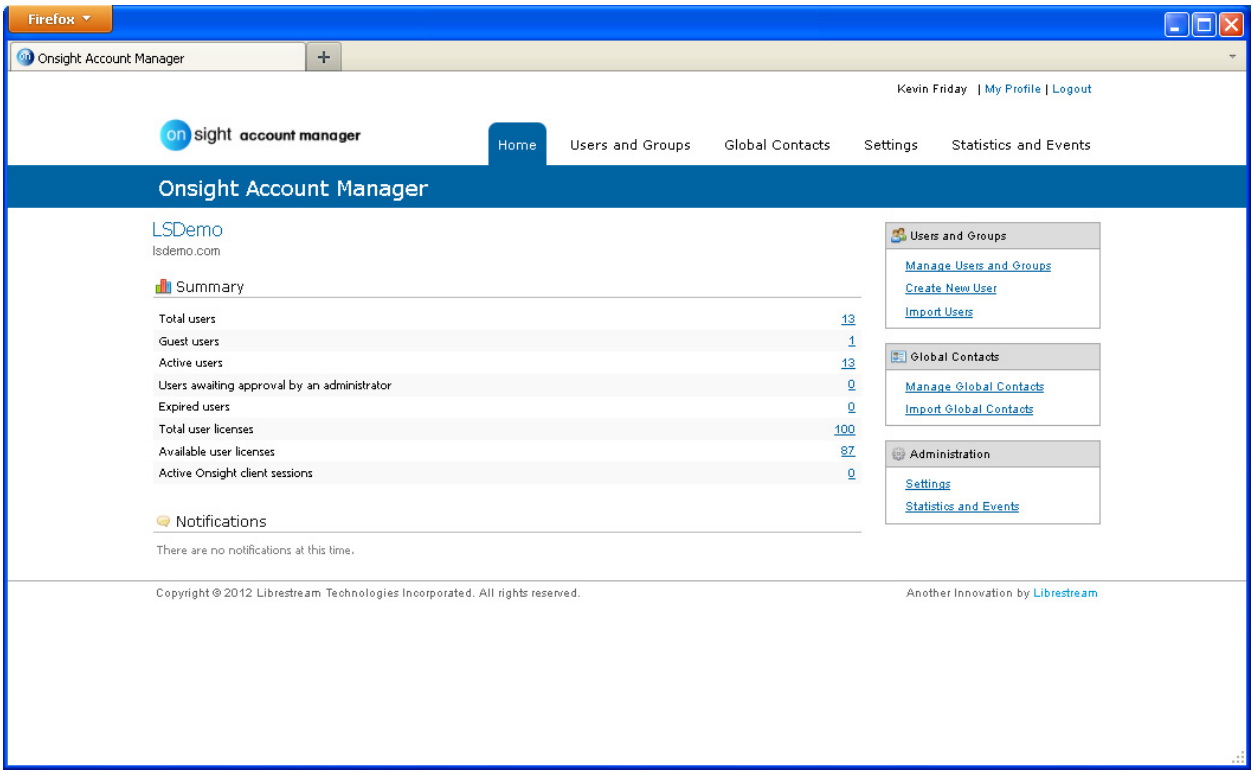

Figure 2 – Onsight Account Manager Home page

4 Administrator's Settings

4.1.1 Changing the Administrator's My Profile

The Administrator account can be used to login to an Onsight Connect endpoint as a User as well as being used to configure OAM. **My Profile** allows the Administrator to configure their personal settings like any other User Account. Once these settings are configured the Administrator can also login to an Onsight endpoint and use it for collaboration.

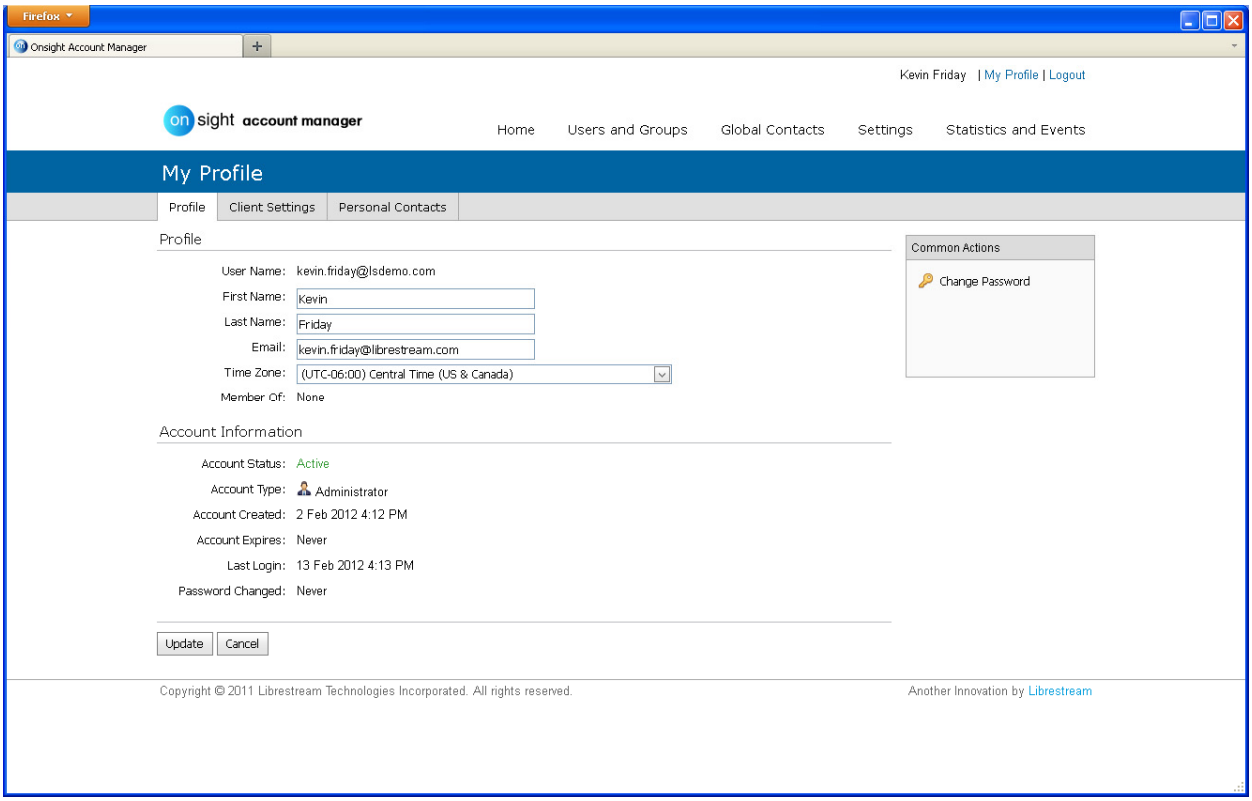

Figure 3 – My Profile

4.1.2 Changing the Administrator's Password

➔ To change the administrator password:

1. Choose **My Profile > Profile**. This will take you to the **Profile** configuration page, shown in Figure .
2. Locate the **Change Password** link, and enter the new password into both provided fields.
3. Click the **Change Password** button to save your changes.

4.1.3 Changing the Administrator's Client Settings

➔ To change the SIP Server and Cisco Presence settings:

1. Choose the **Client Settings** tab.
2. Enter the **SIP Server** settings you would like to use for the Administrator Account.
3. Enter the **Cisco Presence** settings if applicable.
4. Under Client Access Control enable **Client Endpoint Administrator** to also be granted Endpoint Administrator authorization. This setting grants administrator privileges to the user when they login on an Onsight Connect endpoint.

4.1.4 Changing the Administrator's Personal Contacts

➔ To add Personal Contacts:

1. Choose the **Personal Contacts** tab.
2. Click the **New** button.
3. Enter the **Name**, **Address**, and **Type** for the contact.
4. Click **OK** to save.
5. Click the **Global Contacts** button to search for a Global contact to add to your **Personal Contacts** list.

5 Users and Groups

There are three ways the Administrator can add Users:

1. Manually Create New User.
2. Have users Register for an account using the OAM Registration web page (see paragraph 6, Settings, on page 12). You will need to decide if you want users to self-register their User Accounts.
3. Import User list (Contacts.xml or .csv).

5.1.1 Manually Adding Users and Groups

Onsight endpoints retrieve User and Group configuration updates from Onsight Account Manager.

➔ To Manually create Users and Groups:

1. Select the **Users** and **Groups** tab.
2. To add a new Group click on the **New Group** button in the **Manage Users and Groups** Panel. Enter the Group name and click **OK**.
3. To add a new User click the **New User** button. You will be presented with the **Create New User** screen similar to the one shown in Figure .

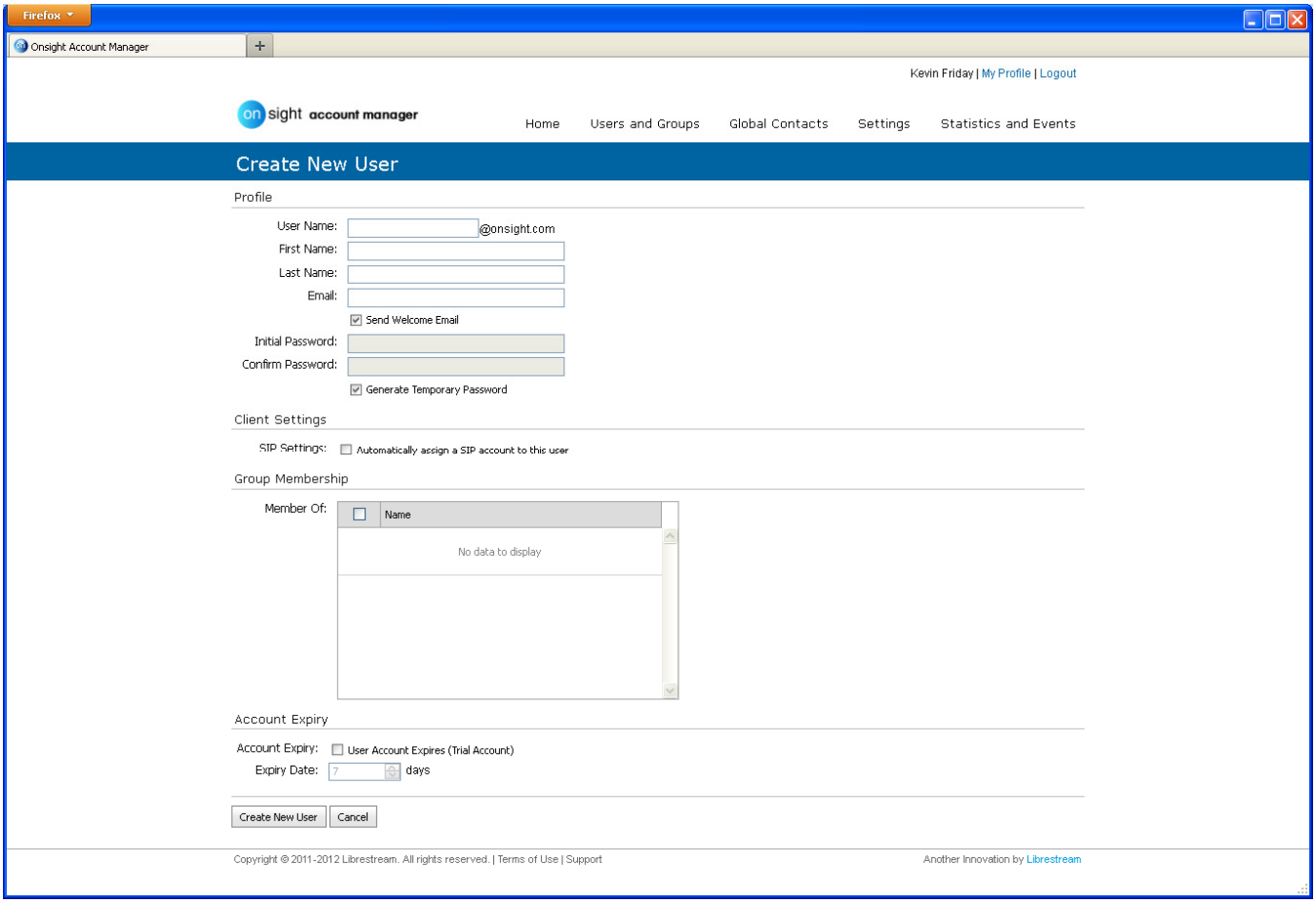

Figure 4 – Create New User

4. Enter the Personal Information for the User. Select whether to 'Send Welcome Email' or 'Generate Random Password'.

5. Check 'Automatically assign SIP account to user' to assign a SIP Account from the Auto-Assignment Pool. See Settings-SIP Settings for details on configuring the Auto-Assignment Pool.
6. Select the **Group Membership** for the user.
7. To apply your changes, click the **Create New User** button at the bottom of the screen.

Send Welcome email *will notify the new user of their Onsight Connect account and how to download and install Onsight Connect.*

Existing Users *can have their SIP Settings assigned or updated from the Auto-Assignment Pool by accessing the Users Client Settings page and pressing* ***Auto-Assign / Update SIP Settings*** *in the Common Actions section.*

➔ User Account Type:

The **Account Type** indicates what level of access the User has to OAM.

Standard User: No Administration Privileges, is allowed to invite Guests (if Guest Invites is enabled)

Group Administrator: Access to the Group level settings they are a member of, i.e. modify users that are in their group (change settings, passwords, etc.); create new users within their group.

Administrator: Full Access to OAM and the Company Domain Settings.

➔ To Assign a Group Administrator:

1. Assign the user **Group Administrator** privileges.
    a. Go to **Users and Groups**, click on **User**.
    b. In the **Common Actions** area click on **Change Account Type**.
    c. Select **Group Administrator** from the Account Type; click **Change Account Type** to apply the change.
2. Assign the Group Administrator to the Group.
    a. Go to **Users and Groups**, click on the Group to which you wish to assign the **Group Administrator**.
    b. Press the **Modify** button.
    c. In the **Common Actions** area click on **Group Administrator**.
    d. Select the **Group Administrator** from the list; click **OK** to apply the change.
    e. Press **Save**

5.1.2 Self-Register Users

See Section 6.1.6

5.1.3 Import Users

The OAM Administrator can import users using a Comma Separated File (CSV) that was created manually. Administrators can also import users from an existing Users and Contacts list created in Onsight Management Suite.

➔ To import Users:

1. Create the file to import. To create a CSV file, follow the format outlined in the OAM '**CSV Import Instructions**'*. You can also export a Contacts.xml file from Onsight Management Suite.
2. Go to **Users and Groups**, click on **Import Users**.
3. Select **Users** from the **Import mode** drop down list.
4. Select the **File to Import**; click **Browse** to find the file you are importing.
5. Click **Upload** to import the file.

*Setting **Import Personal Contacts** in the Import User dialog screen will import all the personal contacts associated with users in the contacts.xml file. (By default only Shared contacts would be imported.) This places all of the Personal contacts contained in the contacts.xml file in the Global directory. Users can add them to their personal contact list by searching the Global Directory. Once they have been added they are present in the contact list when a user logs in to an Onsight Connect endpoint.*

CSV Import Instructions…provides the CSV file format details and is accessible on the **Import From File page.*

5.1.4 Configuring Global Contacts

By default any user added to OAM is automatically added to the Global Contacts list. To add a Global contact that is not an Onsight Connect User such as a third party video conference room, click the 'New Contact' or 'Import Global Contacts' buttons.

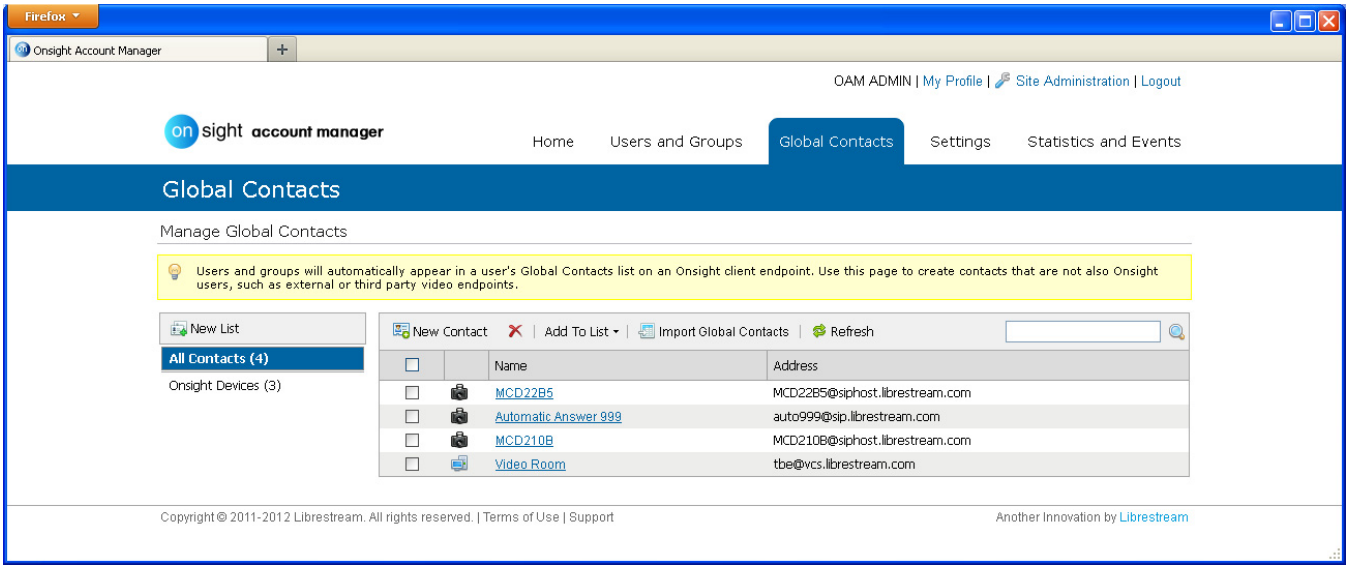

Figure 5 – Global Contacts

➔ To add a Global Contacts List manually:

1. Click the **New List** button below the **Manage Global Contacts** title. You will be presented with the **Create New Contact List** screen.
2. Enter a **Name** for the list and a **Description**.

➔ To add Global Contacts manually:

1. Click the **New Contact** button above global contact list. You will be presented with the **New Contact** screen, shown below.
2. Enter a **Name**, **Address** and **Type** for the endpoint you are adding.

3. If desired, select the **Contact List** to which you are adding the Contact.
4. Click the **OK** button to save your changes.

➔ To Import Global Contacts:

1. Click **Import Global Contacts** button above the global contact list. You will be presented with the **Import From File** screen, shown in Figure .

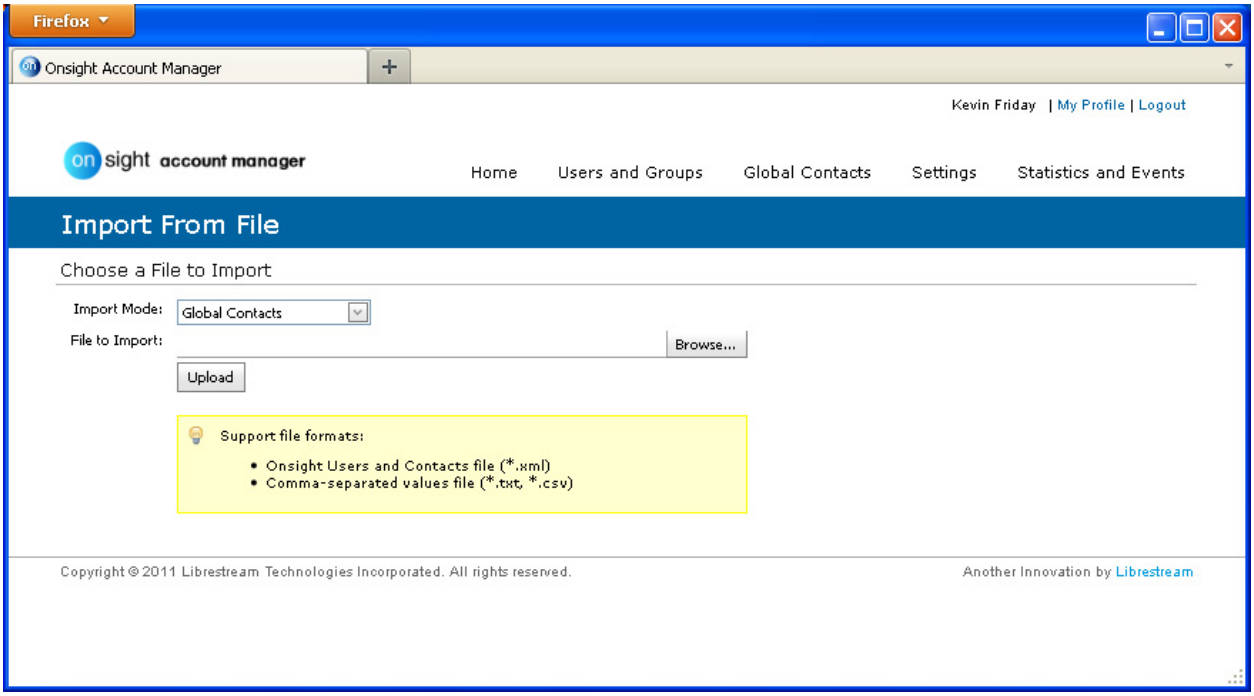

Figure 6 – Import from File

2. Verify the Import Mode is set to **Global Contacts**.
3. Browse to the **File to Import**.
4. Click **Upload** to import the File.

> *When Importing Global Contacts the proper file format must be followed.*

6 Settings

The OAM Administrator can configure the **Settings** for each Onsight endpoint to comply with your desired Policies. **Settings** are applied to the endpoint when a user logs in to Onsight Connect.

- **Guest Users** can be enabled so that any active Onsight Connect User can invite a Guest for a period of time as defined by the Administrator. **Guest Users** have restricted access to OAM but have full access to the Onsight collaboration experience with the exception of the ability to invite another Guest.
- **SIP Settings** are assigned from the **Auto-Assignment Pool**.
- **Onsight Connect** version settings can be selected.
- **Client Policies** are selected for each endpoint, e.g. **Encryption mode**.
- **Security** settings are assigned such as **Password Policy**, **Login Policy**, and **User Account Creation** method.

All Settings are applied to Onsight endpoints after an Onsight User has been authenticated and authorized by OAM during the login process.

6.1.1 Account Information

➔ To view the current Account Information:

1. Choose the **Settings** tab. You will be presented with the **Account Information** screen shown in Figure 7a.

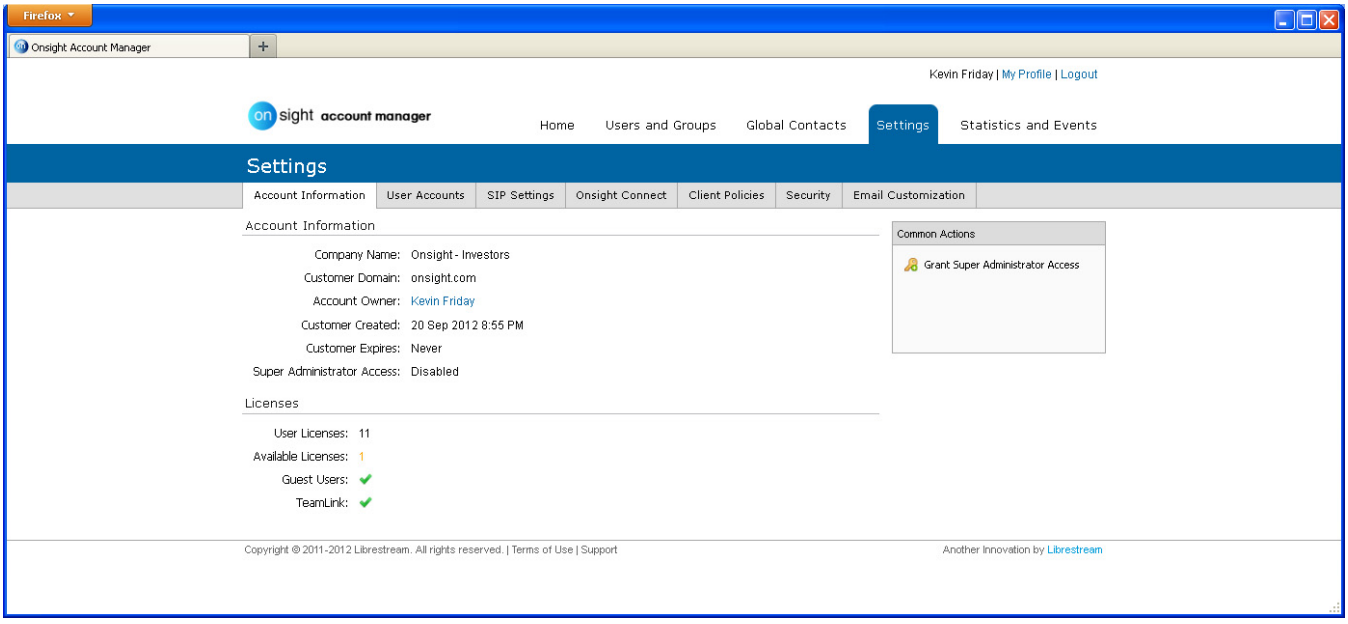

Figure 7a – Account Information

2. **Account Information** is listed including your Company Name, Customer Domain, etc.
3. In the section labeled **Licenses,** you will see the number of **User Licenses**, **Available Licenses** and whether **Guest Users** and **TeamLink** are allowed.

***Guest Users** and **TeamLink** are subscription services that must be purchased from Librestream.*

4. In the **Common Actions** section you can **Grant Super Administrator Access** to Librestream. This allows you to specify the number of hours you would like grant Librestream access to your domain. Librestream access is granted for assistance with setup or troubleshooting purposes.

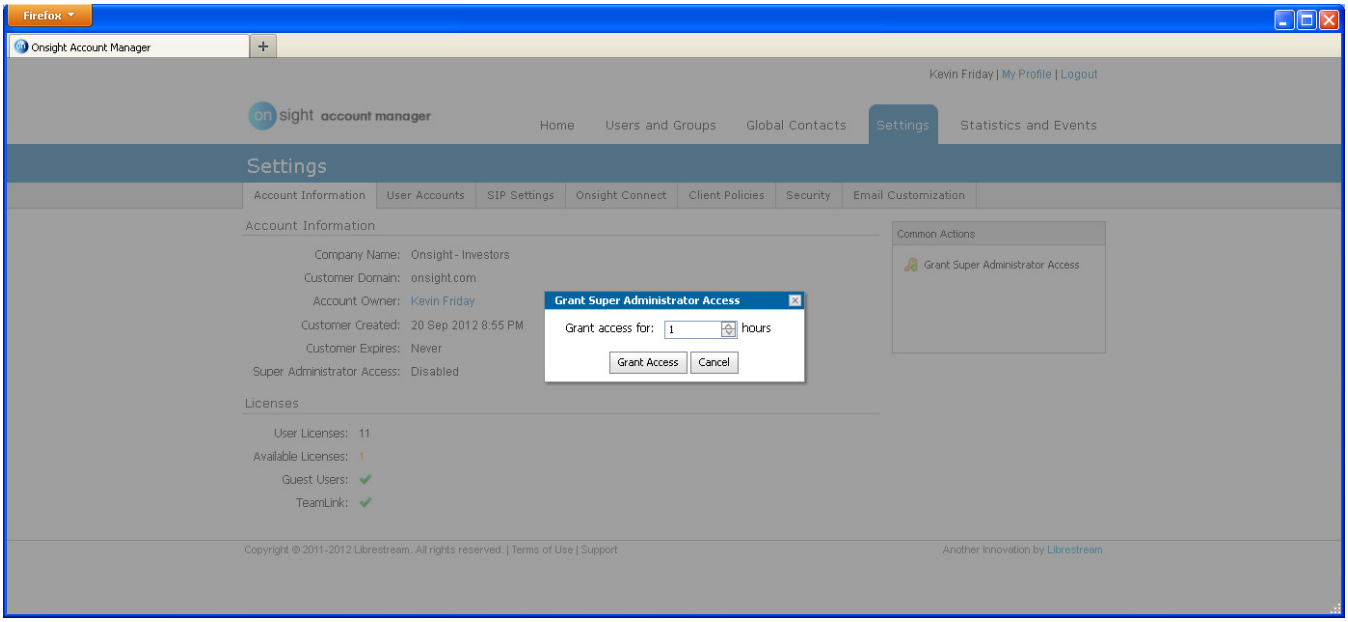

Figure 7b – Grant Super Administrator Access

*Once **Super Administrator Access has been Granted** it can be disabled by pressing **Deny Super Administrator Access,** otherwise it will expire after the set time limit.*

6.1.2 User Accounts

➔ To set the Default Time Zone

1. Set the **Default Time Zone** for all **User Accounts** by selecting the desired zone from the drop down list.

*Librestream Onsight Devices **must** have the accurate date and time set to use the Onsight Connect Service. SSL relies on time/date accuracy to perform authentication.*

➔ To enable Guest Users:

1. To enable **Guest Users** check **Allow users to invite guests**.
2. Set the **Default Expiry** to the desired number of days.
3. To allow users to choose the expiry date check **Users can choose expiry time when inviting guests**.
4. If desired, set **Disable recording of images and video** to disallow a Guest from making recordings.
5. if desired, set **Disable global contacts access** to disallow a Guest from searching the Global Contacts Directory.

6.1.3 SIP Settings

SIP Settings can be automatically assigned to a User who self-registers to OAM using the Registration URL supplied by the Customer Administrator (see page 15). SIP Accounts can be entered into the **Auto-Assignment Pool** using **Multiple Accounts** or a **Shared Account**. Note that when using a **Shared Account** the SIP URI

(a.k.a. the SIP address) is automatically generated from the SIP URI domain and the User ID associated with the OAM User account.

The Transport selected (TCP or TLS) must match the configuration of the SIP Server to which you are registering. Accurate date and time on the endpoint is a requirement for TLS.

➔ SIP Settings: Multiple Accounts

Multiple Accounts are used when you have a fixed number of SIP Accounts available for use with Onsight Connect. Each SIP Account is first created on the SIP Server with a unique authentication name, password and URI. It is then added manually to the OAM SIP Pool for use as Onsight Connect Users are added.

1. Acquire your SIP Account information from the SIP Server Administrator. The SIP Account information must include the SIP Server Address, Authentication name, Password, Username and SIP Domain (Username and SIP Domain are combined to create the SIP URI).
2. In the SIP Settings section select '**Automatically assign SIP accounts to self-registered users**'.
3. Set the **Auto-Assignment Pool** to **Multiple Accounts**.
4. Set the Server Address to the address provided by your SIP Server Administrator.
5. Add the **SIP Accounts** information for each user by clicking the **New** button.
6. In the **Add SIP Account** window enter the **SIP URI** (SIP URI = username & sip domain e.g. user@siphost.librestream.com), the **User Name**, **Password** and **Transport**.
7. **Save** the changes

➔ SIP Settings: Shared Account

Shared Accounts are used when you have wild card SIP Accounts available for use with Onsight Connect. The wildcard SIP Account is first created on the SIP Server then added manually to the OAM SIP Pool for use as Onsight Connect Users are added. Each SIP account shares the same authentication name and password but has a unique URI.

1. Acquire your SIP Account information from the SIP Server Administrator. The SIP Account information must include the SIP Server Address, Authentication name, Password, Username and SIP Domain (Username and SIP Domain are combined to create the SIP URI).
2. In the SIP Settings section select '**Automatically assign SIP accounts to self-registered users**'.
3. Set the **Auto-Assignment Pool** to **Shared Account**.
4. Set the Server Address to the address provided by your SIP Server Administrator.
5. Set the SIP URI Domain to either **Default** or **Custom**.
6. If applicable, enter the **Custom SIP Domain**.
7. Enter the **User Name**, **Password** and **Transport**.
8. **Save** the changes.

6.1.4 Onsight Connect

The OAM Administrator can select which version of Onsight Connect for PC is available for download by Onsight Connect Users. You can select the **Latest Published Version** or a **Specific Version** from a drop down list.

6.1.5 Client Policies

Client Policies allow the OAM Administrator to choose which configuration settings are applied to an Onsight endpoint upon user login.

1. Select either the **Onsight Connect for PC** or **Onsight Device** tab.
2. Click the **Choose Settings** button. You will be presented with the **Choose Settings**.

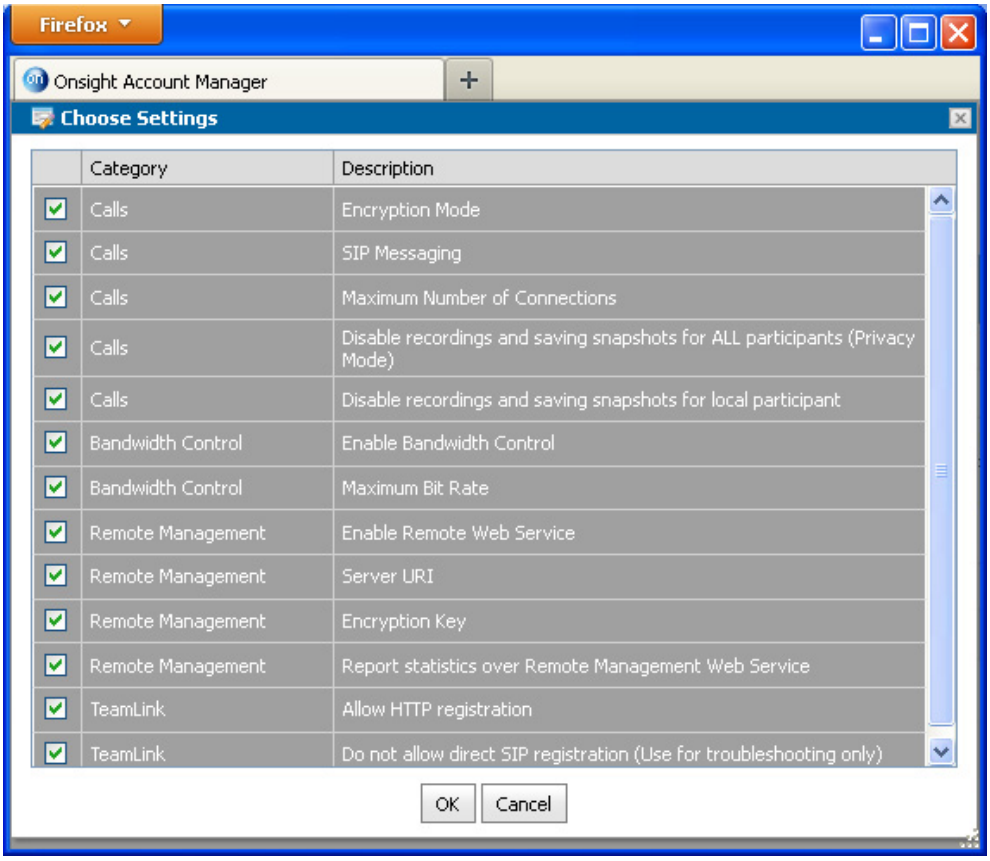

Figure 8 – Client Policies

3. Select the appropriate category for each setting and click **OK**.
4. When you are returned to the **Client Policies** page set the appropriate **value** for each **Category**.
5. Repeat the process for each type of endpoint (Onsight Connect for PC or Onsight Device) you want to configure the **Client Policies**.

By Setting the Remote Management policy you are able to further configure endpoints by pushing configuration and update packages from Onsight Management Suite.

By enabling TeamLink Registration you are automatically turning on TeamLink for each endpoint. By enabling 'Always use TeamLink' you are telling the endpoint to use TeamLink even if the SIP ports on the Firewall are open i.e. tunnel SIP through HTTP/S. Librestream recommends that 'Always use TeamLink' be disabled and only used on a per endpoint basis for troubleshooting purposes.

Client Policies will also apply to Guest Users

6.1.6 Security

The OAM Administrator configures **Security** so that each Onsight Connect endpoint complies with your desired Policies.

6. Set the **Password Policy**. **Minimum Length**, **Minimum Capital Letters** and **Minimum Non-Alpha Characters** can be enforced.
7. Set the **Login Policy** for **Maximum Login Attempts** and **Account Lockout Duration**.

8. **User Account Creation** lets the Administrator **Allow users to create their own accounts**. When enabled new users can register for a User Account using the **Registration URL**. The Administrator can decide whether the **Administrator must approve new accounts** and whether to **Notify Administrators by email when an account is registered**.
9. Click **Update** to save the changes.

➔ To Self-Register Users:

1. Enable 'Allow users to create their own accounts'.
2. Either enter an **Account Creation Key** or press **Generate Random Key** to create the Key if you want Onsight Connect Users to enter additional information for security.
3. Set the **Allowed Email Domains** if you wish to only allow certain email domains to register to Onsight Connect.
4. Enable **Administrator must approve new accounts** if you want to approve user accounts before they are activated.
5. Enable **Notify Administrators by email when an account is registered** if you want to be notified when users register for an account.
6. Send an email notice with the **Registration URL** and the **Account Creation Key** to the list of users who will be self-registering. (See a sample email notice that you can send through your standard email program below.)
7. **Save** the changes.

➔ Sample Self-Registration Email Notice:

Subject: Onsight Connect Account Registration

Onsight Connect Account Registration is now available; please go sign-up for your account at the following link:
Registration URL:
https://onsight.librestream.com/OamAdministrator/AccountServices/Register.aspx?id=librestream.com

Account Creation Key: fae7eee3750e41c49545f11453faf3d5

You will need to create your own User Name and Password. When your account has been approved, you will receive a confirmation email. To begin using Onsight, log in to Onsight Connect with the Username and password you created.

Regards,

Onsight Account Manager

➔ Register for an Onsight Connect Account:

When a new user follows the account Registration URL in the email notice they will see a page similar to the following Account Registration. The User Name domain will match your enterprise's Customer domain as configured by Librestream.

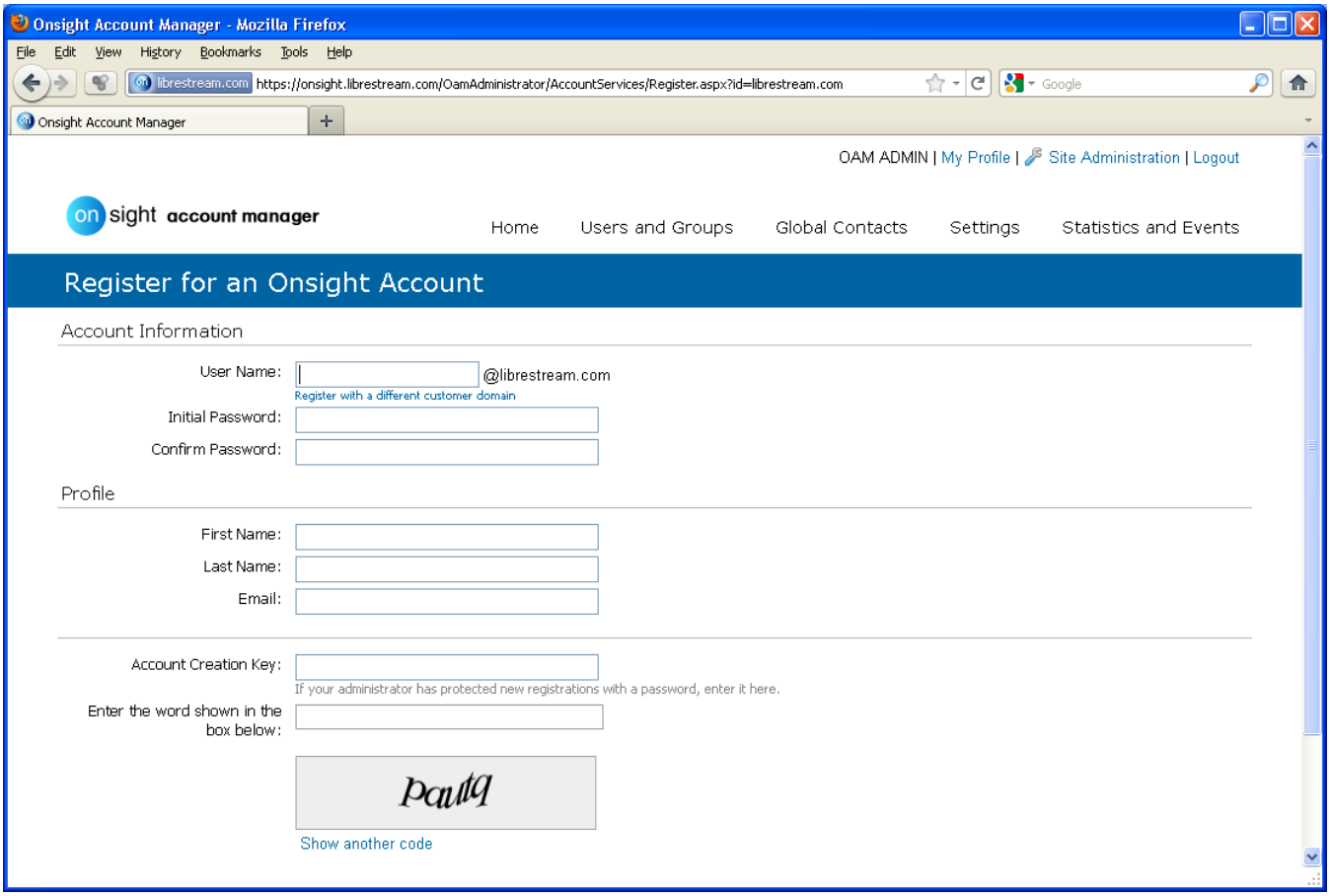

Figure 9 – Register for an Onsight Account

6.1.7 Email Customization

Email Customization allows you to customize the email notices the Onsight Connect users will receive from your Company's Onsight Domain. The following sections can be edited:

1. Custom Message: add a custom message for your Onsight domain users.
2. Company Logo URL: add your company's logo to the Onsight email notifications.
3. Support Desk Contact Information: add information on how to contact your Company's Support desk.
4. Account Created Subject: add a Custom Subject to your Account Creation notification email.
5. Account Created Title: add a Custom Title to your Account Creation notification email.
6. Guest Invitation Subject: add a Custom Subject to your Guest Invitation email.
7. Guest Invitation Title: add a Custom Title to your Guest Invitation email.

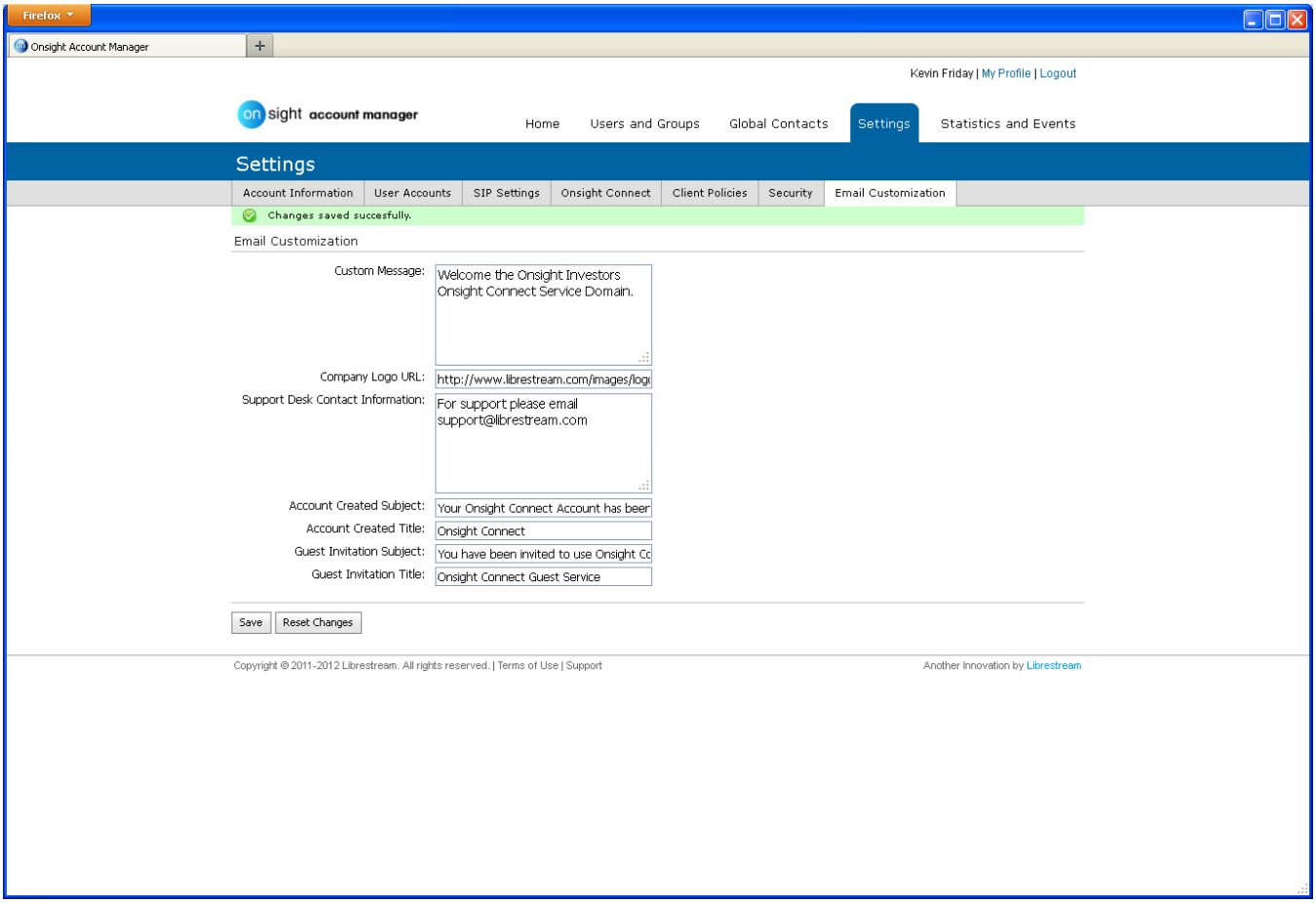

Figure 10 – Email Customization

7 Statistics and Events

Client Activity and **Events** can be viewed on the **Statistics and Events** page by the OAM Administrator.

7.1.1 Client Activity

The **Client Activity** page tracks user activity on the Onsight Connect Service. The Administrator can see who is actively logged in as well as the history of activity.

1. Set the **Filter Parameters** and click **Apply Filter** to display the **Client Activity**.
2. Click **Refresh** to update the list.
3. Click **Export** to save a comma separated file of the report.

7.1.2 Events

The **Events** page tracks Administrator activity on OAM as well as Server based event messages.

1. Set the **Filter Parameters** and click **Apply Filter** to display the **Event Log**.
    a. The selected **Severity** options determine what events are logged.
    b. Set the date range for the period you wish to review.
2. Click **Refresh** to update the list.
3. Click **Export** to save a comma separated file of the report.

8 Onsight Connect for PC – Installation

A new Onsight Connect User is sent a **Welcome email** that will notify the new user of their Onsight Connect account and how to download and install Onsight Connect for PC.

Onsight Connect for PC version 6.1 and later can be installed on either a per-user (Standard) or per-machine (Enterprise) basis. Previous Onsight Connect for PC versions only supported the Enterprise installation option. The Standard installation option was added to enable installations of Onsight by users that do not have Administrator privileges on their PC

For Full details on Onsight Connect for PC Installation see the App Note: ***Onsight Connect for PC - Standard vs Enterprise***, available at http://www.librestream.com/support/knowbase.html.

Users who are upgrading to Onsight Connect for PC v6.1 from a previous version will automatically install the Enterprise version of the software. This is due to the fact that all previous versions of Onsight Connect (or Onsight Expert) used the Enterprise method of installation. If you wish to install the Standard version of the software you must first un-install the Enterprise version.

Users who have Administrator privileges will automatically install the Enterprise version of Onsight Connect for PC.

9 End User License Agreement

This software is licensed under the terms of an End User License Agreement (EULA), the latest version of which can be found at:

http://www.librestream.com/products/termsofuse.html

10 Librestream Contact Information

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